

Module on the transition from work to retirement
 (Persons aged between 50 and 69 years who are employed or who are no longer employed but worked after the age of 49)

MODULE INPUT FILTER:

50<=EDAD<=69 and (TRAPLU<>b or (TRAPLU=b and
 ([TANTA<>0000 and TANTM<>00 and (TANTA-ANO)*12+(TANTM-MES)>588]
 or [TANTA<>0000 and TANTM=00 and (TANTA-ANO)*12>588])))

I will now ask you some questions about your working life in relation to the transition from work to retirement.

If SIDIV1<>2,5 and SIDIV2<>2,5 and SIDIV3<>2,5 and RZULT<>7,8 → Otherwise, go to box 1 before M5

1. Do you currently receive any kind of pension? This includes both contributory and non-contributory pensions, and whether with public or private status.

- Yes 1
- No 6 | Go to box 1 before M3
- Do not know 0 | Go to box 1 before M3

2. Do you receive just one pension or more than one pension? (Note that those from private pension plans are also considered).

- One 1
- More than one 6
- Do not know 0

Box 1

If EDAD <=65 or M1<>6 → Otherwise, go to box before M16

Box 2

If EDAD <=65 or M1<>0,1 → Otherwise, go to M5

If TRAPLU<>b:

3. Do you receive a monthly payment from your former employer as a result of an early retirement for labour market reasons or ERE (collective dismissal proceeding)?

If TRAPLU=b:

3. Do you receive a monthly payment from any former employer as a result of an early retirement for labour market reasons or ERE (collective dismissal proceeding)?

- Yes 1
- No 6
- Do not know 0 | Go to box 1 before M5

If M3=1:

4. Do you also receive an unemployment benefit as a result of this early retirement for labour market reasons or ERE (collective dismissal proceeding)?

If M3=6:

4. And do you receive an unemployment benefit as a result of an early retirement for labour market reasons or ERE (collective dismissal proceeding)?

- Yes 1
- No 6
- Do not know 0

Box 1
 If M1<>6 → Otherwise, go to box before M16

Box 2
 If M1<>1 or M2<>0 or (M3<>1 and M4<>1) → Otherwise, go to M10

Box 3
 If (M3<>1 and M4<>1) or (M1<>0 and (M1<>1 or M2<>1,6)) → Otherwise, go to M11

Box 4
 If SIDIV1<>2 and SIDIV2<>2 and SIDIV3<>2 → Otherwise, go to M6

If M1=0:
5. Do you remember whether you receive a retirement pension, even if it is a partial or early retirement pension?

If M2=0:
5. Do you receive a retirement pension, even if it is a partial or early retirement pension?

If M2=1:
5. Is the pension you receive a retirement pension, including partial and early retirement pensions?

If M2=6:
5. Is any of the pensions you receive a retirement pension, including part or early pensions?

If (SIDIV1=5 or SIDIV2=5 or SIDIV3=5) and RZULT<>7,8:
5. You previously said that you received a pension other than a retirement pension. Apart from this, do you also receive a retirement pension?

If RZULT=7,8:
5. You previously said that you left your last job due to retirement. Do you receive any pension for it?

- Yes 1
- No (this option only appears if M1<>0) 6 | Go to box 1 before M10
- Do not know (this option only appears if M1 <> 0) 0 | Go to box 1 before M10
- Cannot remember (this option only appears if M1=0) 2 | Go to box 1 before M10
- Do not receive any (this option only appears if M1=0) 3 | Go to box 1 before M10

If M2<>1 → Otherwise, go to M7

If SIDIV1=2 or SIDIV2=2 or SIDIV3=2:
6. You previously said that you received a retirement pension or an early retirement for labour market reasons income. Could you please indicate what type it is (or they are, if there is more than one)?

If M1=0 or M2=0:
6. Please indicate the type or types:

If M2=6 or SIDIV1=5 or SIDIV2=5 or SIDIV3=5 or RZULT=7,8:
6. Please indicate the type or types:
(Interviewer: read all options except for 5, as this is a multiple-choice question.)

- 6.1. Retirement or old age pension under the Public System (Social Security, State Pensioners, Mandatory Old-Age and Disability Insurance, etc.)
- 6.2. Pension from an occupational framework (from pension schemes managed by employers or professional associations, or Social Provident Societies)
- 6.3. Retirement pension from individual pension plans (excludes those received as a lump sum) | Go to box 1 before M10
- 6.4. Early retirement for labour market reasons income (this option only appears if SIDIV1=2 or SIDIV2=2 or SIDIV3=2)
- 6.5. Do not know

7. Is it a retirement or old age pension under the Public System (Social Security, State Pensioners, Mandatory Old-Age and Disability Insurance, etc.)?

- Yes 1
- No 6
- Do not know 0

If M7<>1:

8. Is it a pension from an occupational framework (pension plans managed by employers or professional associations, or Social Provident Societies)?

If M7=1:

8. Apart from this retirement pension, do you receive any other from an occupational framework (pension plans managed by employers or professional associations, or Social Provident Societies)?

- Yes 1
- No 6
- Do not know 0

If M7<>1 and M8=1:

9. And apart from this one, do you receive any pension from individual pension plans (excludes those received as a lump sum)?

Rest:

9. And do you receive any pension from individual pension plans (Do not consider those received as a lump sum)?

- Yes 1
- No 6
- Do not know 0

Box 1

If M1<>0 or M5<>2

Otherwise, go to box before M16

Box 2

If (M1<>0 or M5<>1) and (M5<>1 or M2<>1)

Otherwise, go to box before M12

Box 3

If (M2=6 and M5=1,0) or (M2=0 and M5=1,6)

Otherwise, go to M11

10. Do you receive any kind of pension different from a retirement pension?

- Yes 1
- No 6 | Go to box before M12
- Do not know 0

If (SIDIV1=5 or SIDIV2=5 or SIDIV3=5) and RZULT<>7,8:

11. Please indicate the type of pension other than retirement pension that you previously said you received:

If M2=6 and M5=6:

11. Please indicate the types they are:

If M2=1 and M5=6,0:

11. Please indicate the type of pension you receive:

If M10=0 or (M1=0 and M5=3):

11. Do you remember whether you receive any of the following pensions?:

If (M2=0 y M5=0) or [SIDIV1=2 or SIDIV2=2 or SIDIV3=2 or RZULT=7,8] or [((M1=1 and M2=1,6) or M1=0) and (M3=1 or M4=1)]:

11. Please indicate whether you receive any of the following pensions:

Rest:

11. Please indicate the type or types:

(Interviewer: read all options as this is a multiple-choice question.)

- 11.1. Disability or invalidity pension (includes both contributory and non-contributory pensions, and whether with public or private status).
- 11.2. Survivor's pension (widow's, orphan's...). (Again, this includes both contributory and non-contributory pensions, and whether with public or private status).
- 11.3. Other type of pension. (Please specify: _____)
(this option does not appear if M10=0 or (M1=0 and M5=3) or (M2=0 and M5=0) or [SIDIV1=2 or SIDIV2=2 or SIDIV3=2 or RZULT=7,8] or [((M1=1 and M2=1,6) or M1=0) and (M3=1 or M4=1)])
- 11.4. Do not know (this option only appears if M10<>0 and (M1<>0 or M5<>3))
- 11.5. Cannot remember (this option only appears if M10=0 or (M1=0 and M5=3))
- 11.6. Do not receive any (this option only appears if

M10=0 or (M1=0 and M5=3)
or (M2=0 and M5=0) or [SIDIV1=2 or SIDIV2=2 or SIDIV3=2 or RZULT=7,8]
or [(M1=1 and M2=1,6) or M1=0) and (M3=1 or M4=1)]

If M5=1 or M6.1=1 or M6.2=1 or M6.3=1

Otherwise, go to box before M14

12. Did you retire early?

- Yes 1
- No 6
- Do not know 0

13. At what age did you receive your first retirement pension?

(Interviewer: Enter '00' if answer is 'Do not know')

If TRAPLU=b and NUEVE1=6,0 and BUSCA1=6,0 and (M5=1 or M6.1=1 or M6.2=1 or M6.3=1 or M10=1 or M11.1=1 or M11.2=1 or M11.3=1 or M3=1 or M4=1)

Otherwise, go to box before M16

14. Which was the main reason why you stopped working?

- Incentives or favourable economic conditions for retirement 1
- Loss of job or inability to find a job 2
- Reached the maximum retirement age 3
- Met the requirements for receiving a pension 4
- Other work-related reasons 5
- Health problems or disability 6
- Family reasons or caring-for-others responsibilities 7
- Other reasons 8
- Do not know 0

If M14=3:

15. Despite this, would you like to go back to work?

If M14<>3:

15. And would you like to go back to work?

- Yes 1
- No 6
- Do not know 0

If [TRAPLU<>b and 55<=EDAD<=69] or [TRAPLU=b and NUEVE1=6,0 and BUSCA1=6,0 and (M5=1 or M6.1=1 or M6.2=1 or M6.3=1 or ((M10=1 or M11.1=1 or M11.2=1 or M11.3=1) and M3<>1 and M4<>1))]

Otherwise, go to box before M18

If TRAPLU<>b:

16. To ensure a smooth transition to your final retirement, have you reduced your working hours?

If TRAPLU=b:

16. To ensure a smooth transition to your final retirement, did you reduce your working hours before you left your last job?

- Yes 1
- No 6 | Go to box before M18
- Do not know 0 | Go to box before M18

If M5=1 or M6.1=1 or M6.2=1 or M6.3=1

Otherwise, go to box before M18

17. When did you reduce it?

- Before you received your first retirement pension 1
- From the time you started receiving the pension or afterwards 6
- Do not know 0

If TRAPLU<>b and (M5=1 or M6.1=1 or M6.2=1 or M6.3=1 or M10=1 or M11.1=1 or M11.2=1 or M11.3=1 or M3=1 or M4=1)

Otherwise, go to box before M22

If M3=1 and M10<>1 and M11.1<>1 and M11.2<>1 and M11.3<>1:

18. Despite receiving a monthly payment from your former employer, as a result of an early retirement for labour market reasons or an ERE (collective dismissal proceeding), you are still working. Is your main reason for doing so connected with your future pension rights or other financial issues?

If (M3<>1 and M4=1) and M10<>1 and M11.1<>1 and M11.2<>1 and M11.3<>1:

18. Despite receiving an unemployment benefit as a result of an early retirement for labour market reasons or an ERE (collective dismissal proceeding), you are still working. Is your main reason for doing so connected with your future pension rights or other financial issues?

Rest:

18. Despite receiving a pension, you are still working. Is your main reason for doing so connected with your future pension rights or other financial issues?

- Yes 1
- No 6 | Go to M20
- Do not know 0 | Go to M20

19. Specifically, the reason is:

- To obtain or increase your future retirement pension rights 1
- To get sufficient personal or family income 2
- Both 3
- None of the ones above 4

20. Have you considered when you will finally and completely stop working?

- Yes 1
- No 6 | Go to box before M22
- Do not know 0 | Go to box before M22

21. You will do so...

- In a year or less 1
- In more than one year but less than three 2
- In more than three years but less than five 3
- In more than five years but less than ten 4
- In more than ten years 5
- Do not know 0

If M1=6 or ((SIDIV1=2 or SIDIV2=2 or SIDIV3=2) and M6.1=6 and M6.2=6 and M6.3=6 and M6.5=6) or (M1=b and M5=6,0) or (M1=0 and M5=2,3) or (M1=0 and (M3=1 or M4=1))

Otherwise, go to box before M24

22. Are you currently contributing or have you contributed in the past to be entitled to some kind of retirement pension in the future? Also consider any contributions made by your employer.

- Yes 1
- No 6 | Go to box before M24
- Do not know 0 | Go to box before M24

PROGRAMMING INSTRUCTIONS

Question 6:

- **At least one** answer must be chosen from options 1 to 5 in the list.
- The variables M6.1, M6.2, M6.3, M6.4 and M6.5 are constructed as follows:
 - If option '6.1' was chosen in M6, assign the value 1 to M6.1; otherwise, assign it the value 6.
 - If option '6.2' was chosen in M6, assign the value 1 to M6.2; otherwise, assign it the value 6.
 - If option '6.3' was chosen in M6, assign the value 1 to M6.3; otherwise, assign it the value 6.
 - If option '6.4' was chosen in M6, assign the value 1 to M6.4; otherwise, assign it the value 6.
 - If option '6.5' was chosen in M6, assign the value 1 to M6.5; otherwise, assign it the value 6.
- If the option '6.4' is chosen, none of the options from 6.1 to 6.3 can be chosen.
- If SIDIV1=2 or SIDIV2=2 or SIDIV3=2 and 6.4 was chosen as well as one of the above three options (6.1-6.3), the following message will appear: "You cannot select both retirement pensions and early retirement income. Please select only one of the two types (retirement or early retirement)."

Question 11:

- **At least one** answer must be chosen from options 1 to 6 in the list.
- A blank space will be created in option 3 to record the type of pension if the respondent indicates it. It is not absolutely necessary for this space to be filled in order to validate the survey.
- The variables M11.1, M11.2, M11.3, M11.4, M11.5 and M11.6 are constructed as follows:
 - If option '11.1' was chosen in M11, assign the value 1 to M11.1; otherwise, assign it the value 6.
 - If option '11.2' was chosen in M11, assign the value 1 to M11.2; otherwise, assign it the value 6.
 - If option '11.3' was chosen in M11, assign the value 1 to M11.3; otherwise, assign it the value 6.
 - If option '11.4' was chosen in M11, assign the value 1 to M11.4; otherwise, assign it the value 6.
 - If option '11.5' was chosen in M11, assign the value 1 to M11.5; otherwise, assign it the value 6.
 - If option '11.6' was chosen in M11, assign the value 1 to M11.6; otherwise, assign it the value 6.

Question 23:

- **At least one** answer must be chosen from options 1 to 4 in the list.
- The variables M23.1, M23.2, M23.3 and M23.4 are constructed as follows:
 - If option '23.1' was chosen in M23, assign the value 1 to M23.1; otherwise, assign it the value 6.
 - If option '23.2' was chosen in M23, assign the value 1 to M23.2; otherwise, assign it the value 6.
 - If option '23.3' was chosen in M23, assign the value 1 to M23.3; otherwise, assign it the value 6.
 - If option '23.4' was chosen in M23, assign the value 1 to M23.4; otherwise, assign it the value 6.